



SLOVENSKI STANDARD
SIST EN 16114:2011

01-november-2011

Svetovalne storitve na področju vodenja

Management consultancy services

Unternehmensberatungsdienstleistungen

Services de conseils en management

ITEH STANDARD PREVIEW
(standards.iteh.ai)

Ta slovenski standard je istoveten z: EN 16114:2011

[SIST EN 16114:2011](#)

<https://standards.iteh.ai/catalog/standards/sist/938f96b1-1ff0-4ec5-8f57-a2a5f144fbb6/sist-en-16114-2011>

ICS:

03.080.20 Storitve za podjetja Services for companies

SIST EN 16114:2011

en,de

iTeh STANDARD PREVIEW
(standards.iteh.ai)

SIST EN 16114:2011

<https://standards.iteh.ai/catalog/standards/sist/938f96b1-1ff0-4ec5-8f57-a2a5f144fbb6/sist-en-16114-2011>

EUROPEAN STANDARD

EN 16114

NORME EUROPÉENNE

EUROPÄISCHE NORM

September 2011

ICS 03.080.20

English Version

Management consultancy services

Services de conseil en management

Unternehmensberatungsdienstleistungen

This European Standard was approved by CEN on 13 August 2011.

CEN members are bound to comply with the CEN/CENELEC Internal Regulations which stipulate the conditions for giving this European Standard the status of a national standard without any alteration. Up-to-date lists and bibliographical references concerning such national standards may be obtained on application to the CEN-CENELEC Management Centre or to any CEN member.

This European Standard exists in three official versions (English, French, German). A version in any other language made by translation under the responsibility of a CEN member into its own language and notified to the CEN-CENELEC Management Centre has the same status as the official versions.

CEN members are the national standards bodies of Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland and United Kingdom.

(standards.iteh.ai)

SIST EN 16114:2011

<https://standards.iteh.ai/catalog/standards/sist/938f96b1-1ff0-4ec5-8f57-a2a5f144fbb6/sist-en-16114-2011>



EUROPEAN COMMITTEE FOR STANDARDIZATION
COMITÉ EUROPÉEN DE NORMALISATION
EUROPÄISCHES KOMITEE FÜR NORMUNG

Management Centre: Avenue Marnix 17, B-1000 Brussels

Contents

Page

Foreword.....	4
Introduction	5
1 Scope	6
2 Normative references	6
3 Terms and definitions	7
4 Principles	9
4.1 General.....	9
4.2 Policies	10
4.2.1 Regulatory framework.....	10
4.2.2 Communication.....	11
4.2.3 Ethics	11
4.2.4 Corporate Social Responsibility	11
4.2.5 Capability.....	11
4.2.6 Quality.....	11
4.2.7 Guarantees	11
4.2.8 Health and safety	11
4.3 Ongoing evaluation and improvement.....	11
5 Offering	12
5.1 General.....	12
5.2 Purpose.....	12
5.3 Input	12
5.4 Outcome	13
5.5 Contents	13
5.5.1 General.....	13
5.5.2 Context.....	13
5.5.3 Services and deliverables	13
5.5.4 Approach and work plan.....	14
5.5.5 Roles and responsibilities	14
5.5.6 Terms and conditions	15
6 Execution.....	15
6.1 General.....	15
6.2 Purpose.....	15
6.3 Input	15
6.4 Outcome	15
6.5 Contents	16
6.5.1 General.....	16
6.5.2 Refining the agreed work plan	16
6.5.3 Implementing the work plan	16
6.5.4 Assignment management and monitoring.....	16
6.5.5 Approvals and acceptance	18
7 Closure.....	18
7.1 General.....	18
7.2 Purpose.....	18
7.3 Input	18
7.4 Outcome	18
7.5 Content	19
7.5.1 Legal and contractual matters.....	19
7.5.2 Final evaluation and improvement.....	19

ITeH STANDARD PREVIEW
(standards.iteh.ai)

SIST EN 16114:2011

<https://standards.iteh.ai/catalog/standards/sist/958196b1-1110-4cc5-8b57-a2a511441b66/sist-en-16114-2011>

7.5.3	Administrative matters.....	20
7.5.4	Communication	20
7.5.5	Outstanding minor issues	20
Annex A (informative)	Examples of ethical guidelines for MCSPs	21
Annex B (informative)	Examples of values for MCSPs	22
Annex C (informative)	Examples of content of a corporate social responsibility statement.....	23
Annex D (informative)	Examples of evaluation criteria.....	24
Bibliography.....		25

iTeh STANDARD PREVIEW (standards.iteh.ai)

[SIST EN 16114:2011](#)

<https://standards.iteh.ai/catalog/standards/sist/938f96b1-1ff0-4ec5-8f57-a2a5f144fbb6/sist-en-16114-2011>

Foreword

This document (EN 16114:2011) has been prepared by Technical Committee CEN/TC 381 "Project Committee - Management consultancy services", the secretariat of which is held by UNI.

This European Standard shall be given the status of a national standard, either by publication of an identical text or by endorsement, at the latest by March 2012, and conflicting national standards shall be withdrawn at the latest by March 2012.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CEN [and/or CENELEC] shall not be held responsible for identifying any or all such patent rights.

According to the CEN/CENELEC Internal Regulations, the national standards organizations of the following countries are bound to implement this European Standard: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland and the United Kingdom.

iTeh STANDARD PREVIEW (standards.iteh.ai)

[SIST EN 16114:2011](#)

<https://standards.iteh.ai/catalog/standards/sist/938f96b1-1ff0-4ec5-8f57-a2a5f144fbb6/sist-en-16114-2011>

Introduction

The Treaty of Lisbon and the issue of the Services Directive 2006/123/EC show that Governments are determined to create a 'borderless' market for services. To support this strategy, CEN is establishing a set of 'service standards'.

Management consultancy services make a substantial contribution to the European economy. To promote and develop a single market for management consultancy services, the industry and its stakeholders have created this service standard.

The aim of this standard is to improve transparency and understanding between clients and management consultancy service providers (hereinafter referred to as MCSPs). This should lead to better results from consultancy projects and reduce barriers to cross-border trade in management consultancy services.

Successful application of the standard should enable MCSPs to provide better value for clients and reduce risk in management consultancy assignments. By improving the quality, professionalism and interoperability of management consultancy, this standard is intended to enhance the effectiveness of the European management consulting industry and accelerate the development of the profession.

This standard is based on good practice from the management consultancy industry in Europe. It includes recommendations to improve the specification, execution, acceptance and closure of management consultancy services, based on research and the experience of a wide range of MCSPs and their clients.

This standard takes the form of an easy-to-understand guidance document, written from the perspective of the service provider. It applies to all MCSPs, whatever their size or specialism, but does not place requirements or obligations on individuals.

<https://standards.iteh.ai/catalog/standards/sist/93896b1-1ff0-4ec5-8f57-272944d4e31e/en-16114>

Innovation and differentiation are important parts of an MCSP's value proposition. The standard focuses only on the outputs and outcomes; MCSPs are free to use their own methods and approaches.

In summary, the guiding principles of this Standard are that it:

- a) is written as guidance;
- b) does not require certification;
- c) focuses on MCSPs, not on clients;
- d) focuses on MCSPs, not individual internal resources;
- e) is applicable to all MCSPs;
- f) is based on outcomes;
- g) protects innovation and differentiation;
- h) emphasises importance of understanding clients needs;
- i) is easy to understand.

EN 16114:2011 (E)**1 Scope**

This European Standard gives guidelines for the effective delivery of management consultancy services.

This European Standard is applicable to all MCSPs: public and private companies, government entities, not-for-profit organizations and internal consultancy units, regardless of their ownership, structure, size or specialism.

This European Standard applies to any type of assignment for any type of client. It does not place any obligations on the client.

This European Standard provides recommendations for carrying out management consultancy services, including:

- legal and ethical matters (see Clause 4);
- management, communications and evaluation (see Clause 4);
- client relationships (see Clause 4);
- proposal and agreement (see Clause 5);
- planning and execution (see Clause 6);
- closure of the assignment (see Clause 7).

iTeh STANDARD PREVIEW
(standards.iteh.ai)

This European Standard is independent from other normative or regulatory documents, such as:

- provision of support to small businesses (see CEN/TS 99001);
- quality management systems (see EN ISO 9001:2008);
- public procurement (see Public Procurement Directive 2004/18/EC).

This European Standard does not impose upon or interfere with any contractual obligations or intellectual property rights. Also, it does not require or imply a need for third-party certification. It is not intended for certification, regulatory or contractual use, and it is not intended nor designed to be used as the basis for any personal or organizational qualification.

Any offer to certify, or claims to be certified, to this European Standard would be a misrepresentation of the intent and purpose and a misuse of this European Standard. As this European Standard does not contain requirements, any such certification would not be a demonstration of conformity with this European Standard.

It is not intended to provide a basis for legal actions, complaints, defences or other claims in any international, domestic or other proceeding, nor is it intended to be cited as evidence of the evolution of customary international law.

2 Normative references

Not applicable.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

NOTE Defined terms are in bold.

3.1

agreement

formal legally-binding **outcome** from the **offering** phase, defining the **assignment**, consisting of terms and conditions, the **requirements** and the purpose of the **assignment**

3.2

assignment

service to be provided by the **MCSP** to the **client** as described in the **agreement**

NOTE An **assignment** is typically performed as a **project** by the **MCSP**.

3.3

client

organization or person that is the recipient of the **management consultancy services** supplied by the **management consultancy service provider**

NOTE The definition is adapted from the one of “customer” given in EN ISO 9000:2005, applied to this context.

3.4

closure

last phase in the **assignment**

iTeh STANDARD PREVIEW
(standards.iteh.ai)

3.5

communication

maintenance between the **MCSP** and the **client** of clear and systematic flow of information

SIST EN 16114:2011
<https://standards.iteh.ai/catalog/standards/sist/93896b1-1f0-4ec5-8f57-a2a5f144fbb6/sist-en-16114-2011>

3.6

corporate governance

system by which an **organization** makes and implements decisions in pursuit of its objectives

[ISO 26000:2010]

3.7

deliverable

output

tangible item produced by the **MCSP** as part of an **assignment**

NOTE For example a report, a plan, a document.

3.8

enterprise

entity engaged in an economic activity, irrespective of its legal form; this includes self-employed persons and family businesses engaged in craft or other activities, and partnerships or associations regularly engaged in an economic activity

[Commission Recommendation C(2003) 1422]

[CEN/TS 99001:2008]

NOTE This includes public sector entities, NGOs, charities and local governments.

EN 16114:2011 (E)

- 3.9
execution**
performance of the **management consultancy service**
- 3.10
management consultancy service, MCS
service**
set of multidisciplinary activities of intellectual work, within the field of management activities, which aim to create value or promote changes, by providing advice or solutions, by taking actions or by producing deliverables
- 3.11
management consultancy service provider, MCSP
enterprise providing management consultancy services**
- 3.12
offering**
set of activities aimed at reaching an **agreement** to provide **MCS**, excluding supplier selection and pre-sale activities
- NOTE See 5.1.
- 3.13
outcome**
result of a process or an action which refers to something valuable for the enterprise
- NOTE For example an improvement of profitability or value of an indicator.
- 3.14
organization**
group of people and facilities with an arrangement of responsibilities, authorities and relationships
- [EN ISO 9000:2005]
- 3.15
process**
set of interrelated or interacting activities which transforms inputs into **outputs**
- [EN ISO 9000:2005]
- 3.16
project**
unique **process**, consisting of a set of coordinated and controlled activities with start and finish dates, undertaken to achieve an objective conforming to specific **requirements**, including the constraints of time, cost and resources
- NOTE An individual project can form part of a larger project structure.
- [EN ISO 9000:2005]
- 3.17
project governance**
framework by which a project is directed and controlled
- NOTE 1 Project governance includes aspects such as defining the management structure; the policies, processes and methodologies to be used; limits of authority for decision making; stakeholder responsibilities and accountabilities; and interactions such as reporting and the escalation of issues or risks.

NOTE 2 The responsibility for maintaining the appropriate governance of a project is commonly assigned to a project “sponsor” or “leader” or a project steering committee.

3.18

project management

direction of the **project** under the authority of **project governance**

NOTE It is the application of methods, tools, techniques and resources to the management of a project. Project management includes the integration of the various phases of the project life cycle. Project management is accomplished through processes.

3.19

requirement

need or expectation that is stated, generally implied or obligatory

NOTE “Generally implied” means that it is custom or common practice for the organization, its customers and other interested parties, that the need or expectation under consideration is implied.

[EN ISO 9000:2005]

3.20

stakeholder

individual and/or organization that is actively involved in the **assignment** or whose interest may be affected as a result of execution or completion of the **assignment**

4 Principles

iTeh STANDARD PREVIEW (standards.iteh.ai)

4.1 General

This European Standard is structured to reflect the typical phases of a consultancy assignment. It also describes (see 4.2 and 4.3) a guiding policy framework, and includes guidelines for ongoing evaluation and improvement.

Offering phase: The first phase of a consultancy assignment is Offering. The MCSP and the client reach a clear agreement on the service to be provided and commit to working together. Transparency is critical to avoid misunderstanding and minimise risk.

Execution phase: Once agreement has been reached, the second phase of the assignment is Execution. The MCSP implements the service, following the agreed approach and plan. To achieve a mutually positive outcome, the MCSP and the client need to collaborate with confidence, fairness and mutual respect.

Closure phase: The final phase is Closure. After completion of the deliverables and assessment of the outcomes, the assignment is completed by resolving any open items and meeting all contractual and legal obligations. It is critical that the MCSP gains acceptance from the client that the assignment is complete.

Clauses 5, 6 and 7 give more details about each of these phases.

See Figure 1.